

# Fitness-for-Duty Evaluation Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

**A fitness-for-duty evaluation (FFDE)** is a formal psychological examination of an employee, ordered by the employer when objective evidence suggests a psychological condition may be impairing safe or effective job performance. The employer, not the examinee, is the client. The report format is convention (IACP guidelines); the ADA governs when an employer may compel the exam. Most reports run 2 to 8 pages.

## **Referral question and business necessity** the legal gate

**Do:** require a written referral stating the objective evidence (dated incidents, observations, credible reports) and the specific questions to answer.

**Pitfall:** proceeding on rumor or an anonymous letter; without significant evidence the exam itself can violate the ADA.

## **Notification and limits of confidentiality** not treatment consent

**Do:** document what the examinee was told: the employer is the client, who receives the report, no treatment relationship, consequences of declining.

**Pitfall:** a signed form with no record of the explanation; a compelled exam calls for documented notification, not borrowed consent language.

## **Sources and job analysis** the opinion needs a foundation

**Do:** list interviews with dates, records, collateral, tests, and the job description with the essential functions considered.

**Pitfall:** building the opinion on the employer's narrative alone; one-sided foundations collapse under challenge.

## **Testing and validity** why this test, for this job

**Do:** justify each instrument against the referral question and the job, and include response-style measures.

**Pitfall:** a battery with no validity testing; unmeasured over-reporting or under-reporting undermines every score in an adversarial exam.

## **Functional opinion** capability, not pathology

**Do:** answer fit, unfit, or fit with restrictions against named essential functions; keep clinical detail in the examiner's file.

**Pitfall:** disclosing a diagnosis where state law limits the employer to functional information.

## **Restrictions, reevaluation, and distribution** close with a path back

**Do:** state restrictions considered, prognosis, a dated reevaluation window, and the named recipients; file apart from the personnel record.

**Pitfall:** an unfit opinion with no reevaluation path and an open distribution list; both invite the grievance.

## **Before you sign**

- ☐ Written referral question and objective evidence on file
- ☐ Notification documented: client, recipients, refusal effects
- ☐ Every source listed: interviews, records, collateral, tests
- ☐ Opinion tied to named essential job functions
- ☐ Functional language only; diagnosis withheld where restricted
- ☐ Reevaluation window and restrictions stated
- ☐ Distribution named; filed separate from the personnel file

## **Drafting with AI**

Give it the referral, your interview notes, and test summaries; it drafts the notification record, functional findings, and opinion with every limitation tied to a job function.

*"Draft an FFDE report: control room operator, two documented incidents, testing done, opinion unfit with a 60 to 90 day reevaluation."*

**Never paste employee-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.**

**2 to 8 pages**  
1,000 to 4,000 words

**4 to 8 hours**  
clinical team estimate

**Employer is the client**  
and pays; never bill a plan

**HR · counsel · agency**  
who reads it

# Fitness-for-Duty Evaluation Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Employee (initials, position): \_\_\_\_\_ Exam date(s): \_\_\_\_\_ Report date: \_\_\_\_\_

Referred by (name, title): \_\_\_\_\_ Referral received: \_\_\_\_\_ Examiner (credentials): \_\_\_\_\_

## Referral question and objective evidence

The employer's specific questions · dated incidents, observations, or credible reports · business-necessity basis

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## Notification given

Client identified · report recipients · not treatment · consequences of declining · examinee response

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## Sources and job analysis

Interviews with dates · records reviewed · collateral · tests with validity measures · essential functions considered

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## Functional findings

Job-relevant capabilities and limitations · validity of presentation · diagnosis only where authorized

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## Opinion, restrictions, and reevaluation

Fit · fit with restrictions · unfit · prognosis · reevaluation date · restrictions or accommodations

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Distribution (named recipients): \_\_\_\_\_ Signature and credentials: \_\_\_\_\_ Date: \_\_\_\_\_